

Sunset Ridge School District 29

REQUEST FOR PROPOSAL (RFP)

GAURANTEED ENERGY SAVINGS CONTRACT

February 17, 2017

GUARANTEED ENERGY SAVINGS CONTRACT

TIMELINE

<u>Date</u>	<u>Action Item</u>
February 23, 2017	RFP is published and posted on the Capital Development Board website
March 8, 2017	Mandatory Pre-Proposal meeting
April 3, 2017	Proposals due at District office
On or before May 9, 2017	Selection of Qualified Provider
On or before May 9, 2017	Award of Guaranteed Energy Savings Contract

Request for Proposal

Guaranteed Energy Savings Contract

Introduction

Notice is hereby given that Sunset Ridge School District No. 29 is requesting proposals from Qualified Providers to enter into a Guaranteed Energy Savings Contract pursuant to Section 19b of the Illinois School Code (105 ILCS 5/19b-1 et. seq.). Proposals will be accepted and are due on or before 1:00 p.m. on Monday, April 3, 2017 at Sunset Ridge School, Attn: Tom Beerheide, Chief School Business Official, 525 Sunset Ridge Road, Northfield, IL 60093. Proposal should be sealed and clearly marked, "Guaranteed Energy Savings Contract". The contract shall follow the requirements of Article 19b of the Illinois School Code – "School Energy Conservation Measures." For more information contact Tom Beerheide at beerheidet@sunsetridge29.org or 847-881-9457.

The Qualified Provider to whom the work is awarded shall comply with the Illinois Prevailing Wage Act in the performance of all work. The District requests 3 paper copies and one electronic copy in PDF format (on a flash drive) of the proposal which must provide the requested content and in be in the format described within the RFP.

A mandatory pre-proposal meeting for all Qualified Providers has been scheduled for Wednesday, March 8, 2017 at 10:00 AM. Any provider looking to respond to the RFP **MUST** be present. Any questions about this RFP must be submitted in writing to Tom Beerheide, CSBO at beerheidet@sunsetridge29.org no later than Friday, February 24, 2017 no later than 4:00 PM. All questions received will be answered at the mandatory pre-proposal meeting.

The proposals may include: (a) the implementation of a facility audit, data collection, and other related analysis preliminary to the undertaking of Energy Conservation Measures; (b) the evaluation and recommendation of Energy Conservation Measures; (c) the implementation of one or more Energy Conservation Measures; and (d) the implementation of project monitoring and data collection to verify post-installation energy consumption and energy related operating costs pursuant to 105 ILCS 5/19b.

The District reserves the right to terminate this project prior to or after proposals are received. Upon review of the Proposals received in response to this RFP, the District may enter into a contract with the Qualified Provider that best meets the needs of the District. The District will only consider those companies who meet all requirements listed in the RFP.

The District reserves the right to reject any and all proposals and to be the sole judge of the value and merit of the proposals offered.

Delivery of Proposal

The Proposal and the Pricing Proposal will be delivered by hand or sent to Sunset Ridge School District 29 through U.S. Mail or other available courier services to the address shown on page three. The Proposer remains responsible for insuring that its Proposal is received at the time, date, place, and office specified. The District assumes no responsibility for any Proposal not so received, regardless of whether the delay is caused by the U.S. Postal Service, any other carrier, or some other act or circumstance.

Period of Firm Proposal

Prices for the proposed service must be kept firm for at least one hundred and twenty days after the last time specified for submission of Proposals.

Disclosure

The School District discloses that it has worked with Performance Services, Inc. in the preparation of this RFP.

Confidentiality

Respondents should be aware that the School District is subject to the Illinois Freedom of Information Act and cannot guarantee that any document provided by a respondent will be considered exempt from public disclosure under such Act.

If a proposal includes any proprietary data or information that the respondent does not want disclosed to the public, such data or information must be specifically identified as such on every page which it is found. If the District receives a request for disclosure of such information marked as confidential, the District may choose to withhold such information from disclosure at the request of the Qualified Provider provided that the Qualified Provider agree to reimburse the District for all costs, expenses, and fees, including attorney fees, that the District incurs arising from such request.

Sunset Ridge School District 29 Background

Located in the Village of Northfield approximately 20 miles north of downtown Chicago, District 29 consists of two schools. Middlefork School serves students in kindergarten through 3rd grade, while students in 4th through 8th grade attend Sunset Ridge School. District boundaries include a large portion of Northfield, as well as a small section of Northbrook.

The District houses approximately 500 children; depending on the grade level, class sizes range between 15 and 22. Our small class size and an advantageous teacher-student ratio support the District's child-centered philosophy. The school day, schedule,

teaching practices and educational setting at both Middlefork and Sunset Ridge School are tailored to best provide a developmentally appropriate, yet rigorous learning environment. District 29 graduates who continue in public school attend New Trier High School. There they join students from five other New Trier Township districts. Nearby private high school options include Loyola Academy and Regina Dominican High School.

District 29 employs approximately 100 full and part time employees. District 29 School Board along with the Superintendent is responsible for the negotiation of collective bargaining agreements covering the Sunset Ridge Education Association members as well as being responsible for labor and employment matters. Legal firms interested in submitting a response to this RFP are encouraged to visit the District 29 web page at www.sunsetridge29.org to acquire more information.

Like many school districts across the country, Sunset Ridge SD 29, was at a crossroads with an aging facility. Should we continue to invest resources in repair and renovation, or embark on the arduous task of new construction? Seizing this incredible opportunity, the District discovered creative financing techniques, tapped deep community support, and cultivated unique partnerships to design a one-of-a-kind educational center that embraces and expands the concepts of 21st century learning with the “whole child” at its core.

An eye on sustainability and environmental consciousness has led the District to seek proposals to design the first “Net-Zero” school in Illinois, targeting “LEED Platinum” status. The plan is for the school to include a photovoltaic array on its roof allowing students to actively monitor and study energy production and consumption and its effects on the environment.

Minimum Requirements for Qualified Providers

- A. Provide comprehensive energy services and innovative solutions for the District, which may include the installation of energy savings equipment. The specific nature of this equipment and material will be left up to the Qualified Provider and may be based upon the Qualified Providers understanding of the District’s needs.
- B. Ability to demonstrate successful implementation of no less than 3 (three) energy savings contracts within the last 5 years including no less than 3 (three) in Public Educational Institutions in Illinois.
- C. Provide evidence that it is a “Qualified Provider” as that term is defined in Section 19b-1.3 of the School Code (105 ILCS 5/19b-1.3).
- D. Certifies by submission of a proposal, that it does not engage in discriminatory practices regarding employment or delivery of or access to services and programming and that it fully complies with the requirements of federal and State civil rights laws,

including but not limited to: the Illinois Civil Rights Act of 2003, P.A. 93-0425; Illinois Human Rights Act, 775 ILCS 5/1-101 et seq.; the Americans with Disabilities Act, 42 U.S.C.12101 et seq., and the Rehabilitation Act of 1973, as amended, 29 USC 701 et seq., as well as the rules and regulations promulgated there under. Qualified Provider acknowledges that the School Board may declare any contract awarded pursuant to this proposal void if this certification pursues false.

I. PROPOSAL CONTENT & FORMAT

Sunset Ridge SD 29 (the District) requests proposals for the installation and implementation of Energy Conservation Measures as defined in Section 5/19b-1.1 of the School Code (105 ILCS 5/19b-1.1), for the repair, alteration, or betterment of the District's facilities, including any equipment, fixtures or furnishings to be added to or used in such facilities that are designed to reduce energy consumption or operating costs. The District's objectives in issuing this Request for Proposal are to provide a competitive means in which to select a single Qualified Provider to perform the implementation of a guaranteed energy savings contract. The contract shall follow the Illinois School Code and the following RFP format.

Proposals shall be submitted in the format outlined in this section.

A. Table of Contents

Responses shall include a table of contents properly indicating the section and page numbers of the requested information.

B. Executive Summary

Responses shall include a concise abstract stating the respondent's overview of the project. Project pricing/breakdown must be included in the summary.

C. Company Profile

This section should include the following information on the Qualified Provider.

1. Company Qualifications
2. Location of local office and corporate headquarters.
3. Resumes of all key project personnel. Include the name of the engineer(s) or engineering firm providing the design engineering for the project including their PE numbers as well as the PE numbers of all full time employees of the Qualified Provider who are professional engineers registered in the State of Illinois and who will be working on this project.

4. References- List completed Guaranteed Energy Savings Contracts (GESCs) with dates, where similar solutions to those proposed for this project have been implemented within the last 5 years.
5. Litigation- List any projects with which the Provider has been involved in litigation or arbitration during the past 5 years. Provide a brief summary detailing the litigation/arbitration. Omission of any past litigation will result in disqualification.

D. Technical Approach

Section D should contain the following information about the respondent's technical approach to meet the District's energy efficiency, operating cost reduction and comfort objectives.

1. **Needs & Solutions:** Include a "Needs & Solutions" section explaining facility needs and solutions the Provider recommends for all proposed improvements.
2. **Detailed Scope of Work:** Proposals may include any and all improvements that the provider feels would be of benefit to the District as part of this RFP. The Base Project scope must include a solar photovoltaic system to be located on the roof of the New Sunset Ridge School, designed such that the school will be a Zero Energy Building (Net Zero) per the U.S. Department of Energy (DOE) Common Definition for Zero Energy Buildings.
3. **Documentation:** For any work where the provider will be providing pricing, provide the following documentation for the scope of work being proposed.
 - a. **Engineering Drawings of Proposed Improvements Must Be Provided** (Failure to provide drawings may result in evaluation point deductions) where applicable
 - b. Separate from the drawings provided in Section D of the proposal an **Equipment/Material Table providing: manufacturer, type, model, size, and quantity for all equipment provided.** Where applicable
4. **Engineering Approach:** Describe your firm's approach to the technical design of this project.
5. **Energy Engineering:** Provide a detailed explanation of how the Provider intends to calculate energy savings and what types of guarantees will be offered (utility bill analysis, actual measurements and stipulated savings and the cost of each option).

6. **Contractor Selection:** Describe the process that the Provider utilizes to obtain their contractors and what criteria will be used to make the contractor selections.
7. **Equipment Selection:** Describe the process that the Provider utilizes to obtain the equipment to be used on the project and specifically what criteria will be used to make equipment selections.
8. **Installation Approach:** Describe how the Provider intends to implement the installation phase of the project in terms of approach, priorities, philosophies, timelines, change-orders and commissioning
9. **Commissioning: (4) Four Season Optimization:** Describe in detail the commissioning processes that the Provider intends to utilize to commission the building for the learning environment and energy efficiency. Provide actual documents for past projects where this same approach was utilized.
10. **Performance Assurance:** Describe in detail the performance assurance processes that the Provider intends to utilize to insure the building operates at peak performance both at the completion of the installation phase and throughout the contract term.
11. **Additional Information:** Supply any additional information about the Provider's technical approach to the project may be included in the proposal.

E. Financial Aspects

Section E should contain the financial components of the proposed work as identified below.

1. **Pricing:** Describe in detail the process that the Provider intends to utilize to obtain the best prices for the District both initially and if additional work is required. Explain why this is the best approach.
 - a. Include the firm cost and guaranteed energy savings amount for the proposed project.
 - b. Provide the pricing process for any future work including percentage markup for expected general conditions/internal costs, engineering labor, project management labor and profit markup.
2. **Energy Savings:** Explain how the Provider intends to maximize energy savings and the advantage to the Provider's approach. Include in this proposal the provider's actual Guaranteed Energy Savings Contract for the

priced improvements along with all corresponding calculations. Break out actual (real dollar) energy and operational savings in the RFP response.

- a. Include a detailed financial pro-forma model that shows the expected cash flows to the district from the proposed solar photovoltaic system. The model shall clearly state all assumptions and shall include a Net Present Value (NPV) analysis of the project. Clearly state the Discount Rate used in the analysis and the reasoning for such a rate. The model shall also clearly show how the proposed system allows the building to be a Zero Energy Building (per the U.S. DOE definition), including, to what extent it achieves this objective and for how long, given the stated assumptions in the provided financial model. (Failure to provide a clear and well-reasoned financial model may result in evaluation point deductions.)

3. **Energy Savings Results**

- a. Provide an annual energy savings report (M&V) to the district. Detail how the report is generated. Include any information with regards to cost and timing of the report.
 - b. Shortfalls
 - ♦ The Provider must include a summary of the reported annual savings for all completed projects. Any projects that did not meet the annual energy guarantee must be listed with an explanation for the shortfall.
4. **Project Funding:** Project funding will be developed by the school after selection of the provider.

F. **Implementation Plan**

1. Include in your proposal an implementation plan including dates describing how the qualified provider intends to execute the project that meets the timelines set forth in these specifications.
2. Describe in detail your approach to project management for this energy conservation program.
3. Provide an implementation timetable as well as a staffing plan identifying key project management personnel.

II. **EVALUATION CRITERIA**

The District may reject any proposal that does NOT meet the minimum criteria described in this RFP. The District will use the following criteria when evaluating the proposals:

A. Ability of the team to successfully implement Program

1. Reputation of the Provider for successfully implementing energy savings projects and providing proven energy savings with scopes of work similar to those being considered for this project (solar PV)
2. Background and Proposals of the people responsible for implementing the proposed GESC. This includes in-house engineers and technicians responsible for the designing, programming and commissioning of the project.
3. References of the company and people responsible for implementing the project.

B. Technical Approach

1. Refer to section I-D for criteria
Preference will be given to proposals that include a detailed and sound technical approach to meeting the District's objectives.

C. Financial Consideration & Net Economic Impact

1. Refer to section I-E for criteria

D. Performance Guarantees

1. Value offered by the energy savings guarantee
2. Methodology and value of proposed measurement and verification plan

CERTIFICATIONS

1. **BID-RIGGING AND BID-ROTATION**

The undersigned Participant or law firm hereby certifies that he is not barred from proposing on this contract as a result of a violation or conviction of either the bid-rigging or bid-rotation provision of Article 33E of the Criminal Code of 1961 as amended.

2. **NON-COLLUSION AFFIDAVIT**

The undersigned Participant or agent states that he has not, nor has any other member, representative, or agent of the firm, company, corporation or partnership represented by him, entered into any combination, collusion or agreement with any person relative to the price to be proposed by anyone at such letting, nor to prevent any person *from* proposing nor to induce anyone to refrain from proposing, and this proposal is made without reference to any other proposal and without any agreement, understanding or combination with any other person in reference to such proposal.

3. **SEXUAL HARASSMENT CLAUSE**

The undersigned Participant is in full compliance with the requirements of section 2-105 of the Illinois Human Rights Act (Public Act 87-1257) effective July 1, 1993, with respect to sexual harassment policies. The terms of that law, as applicable, are hereby incorporated into this contract.

4. **EQUAL EMPLOYMENT OPPORTUNITY CLAUSE**

The undersigned hereby certifies that the Participant is in compliance with the Equal Employment Opportunity Clause and the Illinois Fair Employment Practices.

5. **CRIMINAL BACKGROUND INVESTIGATIONS**

Contractor/law firm is in compliance with Senate Bill 540, P.A. 86-411, effective as of January 1, 1990, which states that criminal background investigations must be conducted by the Department of State Police on all employees working for contractors doing business with the school district who come in daily contact with children.

6. **ILLINOIS DRUG FREE WORKPLACE ACT**

The undersigned, having 25 or more employees, does hereby certify pursuant to section 3 of the Illinois Drug-Free Workplace Act (30 ILCS 580/3) that it shall provide a drug-free workplace for all employees engaged in the performance of work under the contract by complying with the requirements of the Illinois Drug-Free Workplace Act and, further certifies, that it is not ineligible for award of this contract by reason of debarment for a violation of the Illinois Drug-Free Workplace Act.

7. **NO SMOKING CLAUSE**

Participant agrees that he, his employees and sub-contractors, will abide by the District 29 no smoking policy on any District 29 property.

By signing and notarizing this document, I state and declare that the Participant/Law Firm listed below and I are in compliance, and will comply, with all of the Certifications listed herein.

_____ Signature	_____ Date
_____ Firm	_____ Participant/Contractor
_____ Address	_____ Phone
_____ Address	_____ NOTARY signature/date

NOTARY STAMP: